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Canada

Food Processing Ingredients

An Updated Overview of the Food Processing Sector in Canada

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Report Highlights:

Opportunities exist to expand U.S. food product sales to Canada's food and beverage processing sector. In this C\$83 billion industry, demand is increasing for many U.S. raw and processed horticultural products as well as other processed ingredients and food flavorings. The following report highlights the performance of the various sectors of Canada's food and beverage processing industry.

Post:

Ottawa

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SECTION 1: MARKET SUMMARY

OVERVIEW OF CANADIAN MARKET

Opportunities exist to expand U.S. food product sales to Canada's food and beverage processing sector. In this C\$83 billion industry, demand is increasing for many U.S. raw and processed horticultural products, other processed ingredients and food flavorings. The following report highlights the performance of the various sectors of Canada's food and beverage processing industry.

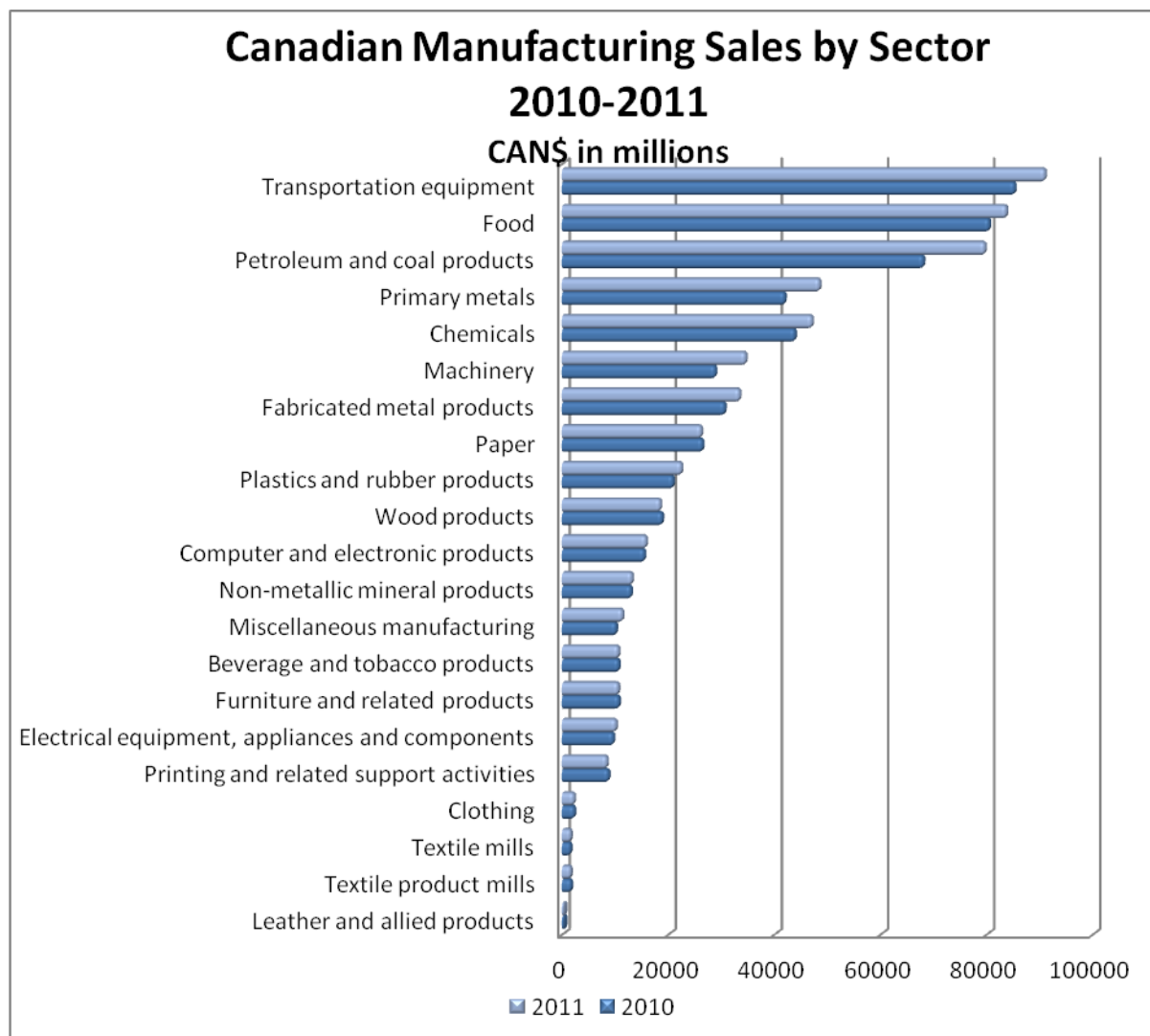
In 2011, U.S. agricultural exports to Canada reached a record C\$18.8 billion. Exports to Canada accounted for 13.9 percent of total U.S. food and agricultural products, which reached C\$137 billion. American products account for approximately 60 percent of Canada's total agricultural imports. In the first three quarters of CY2012, U.S. agriculture exports to Canada have increased by 8 percent over the same time frame last year and already stand at C\$17 billion.

Canada is also an important market for U.S. fish and forestry products. Canada is the second largest market for U.S. fish and seafood products, with sales increasing 12 percent from 2010 to 2011 to reach C\$905 million. Despite being a major producer and world exporter of forest products, Canada is the largest market for U.S. forestry products, with sales in 2011 totaling C\$2.3 billion. Combined, total U.S. farm, fish and forestry product exports to Canada reached a record C\$22.1 billion during 2011. Total bilateral trade of agricultural products between the U.S. and Canada reached C\$38 billion in 2011, over C\$104 million per day. When forestry and fish products are included, bilateral trade reaches over \$48 billion.

Under the tariff elimination provision of the North American Free Trade Agreement (NAFTA), the majority of U.S. agricultural products have entered Canada duty-free since January 1, 1998. On December 4, 1998 the United State and Canada signed a Record of Understanding, an agreement to further open Canadian markets to U.S. farm and ranch products.

Trade with Canada is facilitated by proximity, similar culture, language, common lifestyle pursuits, and the ease of travel among citizens for business or pleasure. Many American products have gained an increased competitive edge over goods from other countries as the result of the FTA/NAFTA. Canada's grocery product and food service trades have been quick to seize opportunities under FTA/NAFTA, which permitted them to expand their geographical sourcing area to include the United States. Declining import duties under the trade agreements and an easing of Canadian packaging requirements for processed horticultural products for the food service market have resulted in significant gains in the Canadian market for U.S. consumer-ready foods and food service products.

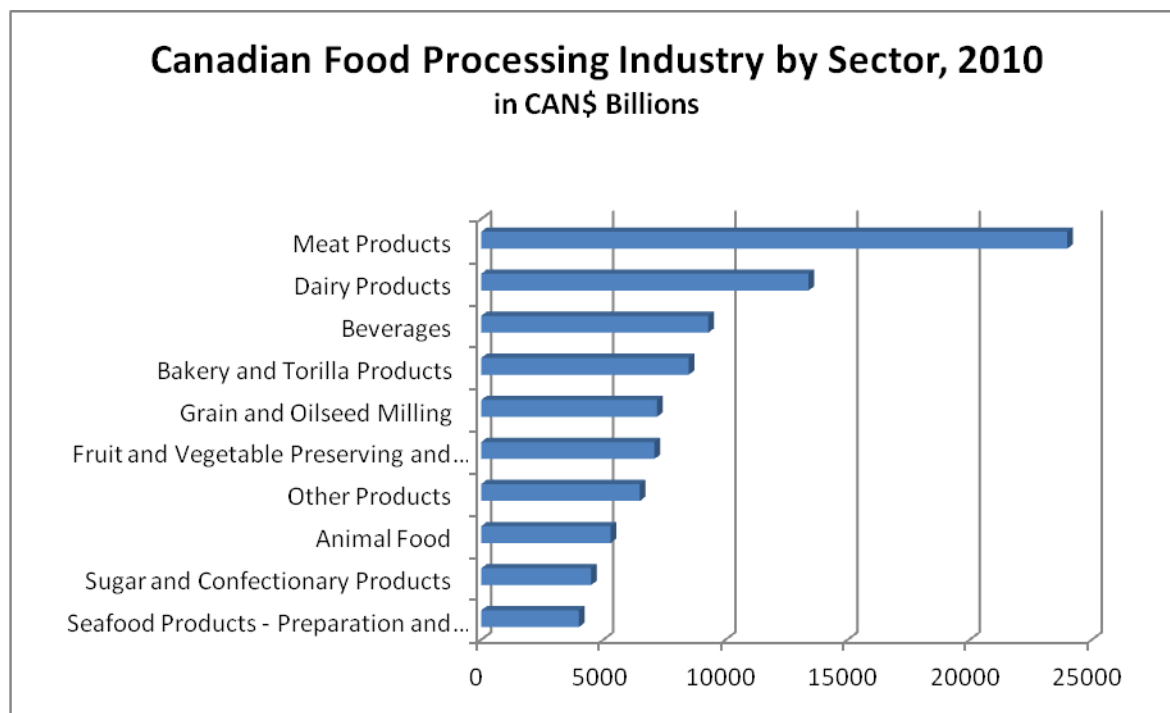
Food and beverage processing in Canada began in the mid-1800's and has successfully evolved into a sophisticated and vital contributor to Canada's food, agriculture and economic sectors. In 2011, the food and beverage processing industry produced shipments worth C\$92.9 billion, two percent of Canada's total GDP. The industry supplies 75 percent of the processed food and beverage products available in Canada. Exports in 2011 reached \$23.3 billion, with 67 percent of that total going to the United States.



Note: Figures may not add to totals due to rounding

Source: Statistics Canada, Manufacturing industries, CANSIM table 304-0014

Food and beverage processing is an important contributor to the Canadian economy. In 2011, employment in the sector increased modestly to 251,800. Agriculture and Agri-Food Canada estimates that the Canadian food and beverage processing industry supplies approximately 80 percent of the processed food and beverage products available in Canada. Beverage processing includes soft drinks and bottled water manufacturing, wineries, breweries and distilleries. A breakdown of the manufacturing industry from 2006, the last year for which data is available, is as follows. Agriculture and Agri-Food Canada has more information on the food and beverage processing industry on their website at: <http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1171288446081&lang=eng>.



Source: FOODTECH Canada, Significance of the Food Industry in Canada

CANADIAN EXPORTS OF PROCESSED FOOD AND BEVERAGE PRODUCTS

Exports of processed food and beverage products stood at C\$23.3 billion in 2011, up 12 percent from 2010. Canadian processed food and beverage products are exported all over the world; however a significant portion is focused in a small number of countries. In 2011, 82 percent of those exports went to three major markets; the United States (67 percent), China (8 percent) and Japan (7 percent). Canada's trade balance in processed food products has remained positive, even throughout the recession.

Canadian Food and Beverage Industry		2009	2010	2011
Shipments	C\$ Million	85,260	87,000	89,980
	Change (%)	0.7	2.1	3.4
Imports	C\$ Million	21,160	21,040	23,140
	Change (%)	4.1	-0.5	10
Exports	C\$ Million	19,260	20,760	23,340
	Change (%)	-6.2	7.7	12.4
Domestic Market	C\$ Million	87,140	87,320	89,800
	Change (%)	3.2	0.2	2.8

Canadian Food and Beverage Industry		2009	2010	2011
Export Intensity ¹	%	23	24	26
Domestic Market Share ²	%	76	76	74

1. Export Intensity = exports/shipments 2. Domestic Market Share = (shipments-exports)/domestic market

Source: Food in Canada, 2012 Canadian Food Industry Report

IMPORTS OF INGREDIENTS FOR THE CANADIAN FOOD PROCESSING INDUSTRY

Canadian food processors utilize both raw and semi-processed ingredients from imported and domestic sources. No data exists on the total value of imported ingredients destined for the Canadian processed food and beverage industry; however imported ingredients are vital inputs to Canadian manufacturers. Imported ingredients cover virtually all food categories. For example, whole raw products such as strawberries, semi-processed products such as concentrated juices and fully prepared products such as cooked meat products have proven to be essential to processors in Canada. Some ingredients, such as tropical and sub-tropical products, are entirely imported while substantial imports of numerous other products may also be required. These products include spices, food manufacturing aids and flavorings. For example, 90 percent of the Canadian sugar supply is imported and 40 percent of the demand for flour, edible oils and breakfast cereals is supplied by imports.

ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN CANADA

Advantages	Challenges
Canadian consumers enjoy a high disposable income	Canadian food processors are now searching the globe for low cost ingredients
Taste and expectations similar to those in the U.S.	Growth of private label pushing processors to look for less expensive inputs
Good perception of U.S. quality and safety	Tariff Rate Quotas for certain products
Opportunity in global cuisine due to diverse population and growing interest in ethnic foods	Marketing and distribution costs can be high as population is roughly equal to California's and much more spread out
Canadian growing season is limited, opportunity for U.S. producers in off seasons	Retail consolidation forcing competitive pricing, however might be alleviated by new entries to market such as Target
Duty free tariff treatment for most products under NAFTA	Differences in approved chemicals and residue tolerances
Comparable legal systems, time zones, regulatory regimes	Difference in labeling including nutritional content, claims and language
Proximity: most Canadian live within two hour drive from the U.S. border	Majority of sourcing currently from domestic producers, "Buy Local"

SECTION 2: ROAD MAP FOR MARKET ENTRY

ENTRY STRATEGY

Though Canada is a long established market for U.S. agricultural products, plenty of opportunities exist for companies interested in exporting. In Fiscal Year 2012 (October 2011 to September 2012), U.S. agricultural exports to Canada grew by almost C\$1.5 billion dollars, or 7 percent over FY2011.

Companies in the United States enjoy advantages made possible by an established shipping corridor, similar consumer preferences and expectations as well as favorable duty rates under NAFTA.

Canadians are always on the lookout for new and innovative U.S. products, but each sector and product can pose its own challenges. These obstacles can include currency, labeling and customs. With the right tools, these can be overcome. Following are the main steps for U.S. exporters who are looking to enter the Canadian market.

1. CONTACT YOUR STATE REGIONAL TRADE GROUP

State Regional Trade Groups (SRTGs) are non-profit organizations representing state agricultural promotion agencies that use federal, state and industry resources to promote the export of food and agricultural products. They can help qualifying exporters to obtain partial reimbursement for some marketing costs.

Food Export Association of the Midwest USA	Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin	www.foodexport.org 309 West Washington, Suite 600 Chicago, IL 60606 USA Phone 312.334.9200 Fax 312.334.9230
Food Export USA Northeast	Connecticut, Delaware, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont	www.foodexport.org One Penn Center 1617 JFK Blvd Suite 420 Philadelphia, PA 19103 USA Phone 215.829.9111 Fax 215.829.9777
Southern United States Trade Association	Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia, the Commonwealth of Puerto Rico	www.susta.org 701 Poydras Street Suite 3725 New Orleans, LA 70139 Phone: (504) 568-5986 Fax: (504) 568-6010
Western United States Agricultural Trade Association	Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming	www.wusata.org 4601 NE 77th Ave, Suite 240

		Vancouver, WA 98662 Tel: 360-693-3373 Fax: 360-693-3464
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Additionally, many commodities have their own marketing associations which may be able to provide additional, product specific information. A listing of the groups who are active in Canada be found here: <http://www.tasteus.ca/about/listing-of-cooperators/>

2. RESEARCH THE COMPETITIVE MARKETPLACE

A thorough understanding of consumer trends and needs is vital to developing a market strategy. The internet offers a wealth of information for U.S. exporters interested in researching the many aspects and particularities of the Canadian food and beverage market. Though some consumer data can only be obtained with a fee, there are several industry specific publications that continuously report on specific developments of interest for U.S. exporters. Some of these resources are listed in the table below.

The Foreign Agricultural Service (FAS) publishes reports on Canada throughout the year. These reports can be found at <http://gain.fas.usda.gov>. Additionally, FAS Canada has launched a new website targeted at Canadian consumers. It also contains links to the State Regional Trade Groups and cooperators as well as articles that may be of interest to U.S. exporters. The website can be found at www.tasteus.ca.

The Canadian government has recently passed the "Safe Food for Canadians Act" which will result in changing regulations for food products entering the Canadian market. It will be important to monitor changes caused by this act over the coming year. FAS Canada puts out regular updates on changes in Canada in its "This Week in Canadian Agriculture" (TWICA) newsletters. To be added to this list, please contact the FAS Canada office at agottawa@fas.usda.gov.

Canadian Government Market Information Resources:

Agriculture and Agri-Food Canada	Provides information and research on policies and programs. Also provides access to statistics. This Ministry is the counterpart to the USDA.	www.agr.gc.ca
Industry Canada	Information on specific sectors, as well as company profiles and other databases	www.ic.gc.ca
Statistics Canada	The official source for Canadian social and economic statistics and products.	www.statcan.gc.ca

Industry Associations:

Canadian Restaurant and Foodservices Association	The largest hospitality association in Canada.	www.crfa.ca
Hotel Association of Canada	National resource for the Hotel and Lodging Industry in Canada.	www.hotelassociation.ca
I.E. Canada (Canadian	I.E. Canada is a national, non-profit organization committed to providing	www.iecanada.com

Association of Importers and Exporters)	services to develop and enhance the international trade activity and profitability of importers and exporters.	
Restaurant Central	Research site maintained by the CRFA	http://www.restaurantcentral.ca/

Industry Publications:

Canadian Grocer	Focus is on retail, but contains good information on market trends.	www.canadiangrocer.com/
Canadian Restaurant and Foodservice News	Bi-monthly publication by the CRFA.	www.crfa.ca
Food in Canada	Focus in on manufacturing, but contains good information on changing requirements and industry developments.	www.canadianmanufacturing.com/food
Foodservice and Hospitality	Monthly magazine focusing on the Hospitality Industry in Canada.	www.foodserviceworld.com
Hotelier Magazine	Published 8 times per year, focuses on hotel industry in Canada	www.hoteliermagazine.com

3. LOCATE A BROKER/DISTRIBUTOR/IMPORTER

It is recommended that most new entrants to the Canadian market secure the services of a broker and/or distributor.

Local representation provides exporters with a domestic advantage to understanding the local, regional and national markets and the opportunities available. Brokers and distributors provide guidance on best business practices, sales contacts, market development, logistics and government regulations. Many also provide merchandising and marketing programs and their volume purchasing power can help reduce retail slotting fees.

The Foreign Agricultural Service offices in Ottawa and Toronto can provide assistance in locating a broker or distributor by assembling lists of potential partners. Contacts can be made while exhibiting at the USDA endorsed pavilion at SIAL Canada. The office has also assembled a [partial list of industry brokers and distributors in central Canada](#).

4. UNDERSTAND CANADIAN GOVERNMENT STANDARDS AND REGULATIONS THAT PERTAIN TO YOUR PRODUCT

The Canadian Government has multiple acts that govern the importation and sales of foods. Some of the most important ones are:

- [Canada Agricultural Product Act and Associated Regulations](#)
- [Consumer Packaging and Labelling Act](#)
- [Fish Inspection Act](#)
- [Food and Drug Act](#)
- [Food and Drug Regulations](#)

- [Importation of Intoxicating Liquors Act](#)
- [Meat Inspection Act](#)
- [Weight and Measures Act](#)

A more thorough outline of applicable acts and regulations can be found on the Canadian Food Inspection Agency's website at: www.inspection.gc.ca.

The Canadian Food Inspection Agency, Health Canada and the Department of Foreign Affairs and International Trade are the main government ministries U.S. exporters can contact for specific information when studying regulations with which they need to comply. Though Canada and the U.S. share many consumer trends, cultural similarities and lifestyles, many regulations differ – including nutrition facts, ingredient declarations and health claim labeling. Moreover, as previously mentioned, Canada is in the process of drafting several major regulatory changes. Exporters should make an effort to stay abreast of the latest developments.

Government Organization	Function	Information
Canadian Food Inspection Agency (CFIA)	Government of Canada's regulator for food safety (along with Health Canada), animal health and plant protection.	www.inspection.gc.ca
Canada Revenue Agency	The Canada Revenue Agency (CRA) administers tax laws for the Government of Canada and for most provinces and territories as well as various social and economic benefit and incentive programs delivered through the tax system.	www.cra-arc.gc.ca
Canada Border Services Agency	The Canada Border Services Agency (CBSA) ensures the security and prosperity of Canada by managing the access of people and goods to and from Canada.	www.cbsa.gc.ca
Health Canada	Administers the Food Safety Assessment Program, which assesses the effectiveness of the CFIA's activities related to food safety.	www.hc-sc.gc.ca
Department of Foreign Affairs and International Trade	The mandate of Foreign Affairs and International Trade Canada is to manage Canada's diplomatic and consular relations and to encourage the country's international	www.international.gc.ca

(DFAIT)	trade. DFAIT manages all tariff rate quotas.	
Measurement Canada	Responsible for ensuring the integrity and accuracy of measurement in the Canadian marketplace.	www.ic.gc.ca/eic/site/mc-mc.nsf/eng/Home

For more information on food labeling regulations and other information useful to U.S. food exporters, refer to the Canada 2011 Exporter Guide on the FAS website: <http://gain.fas.usda.gov>.

Information exporters need to understand about labeling regulations can be found on the following sites:

Nutrition Labelling Resource Page: www.inspection.gc.ca/english/fssa/labeti/nutrition-pagee.shtml.

The Guide to Food Labeling and Advertising guide can be found at:
<http://www.inspection.gc.ca/english/fssa/labeti/guide/toce.shtml>

In order to better provide information, the CFIA maintains a National Import Service Centre (NISC), which handles telephone inquiries regarding import requirements and inspections in addition to processing import documentation and data. The contact information for the NISC is:

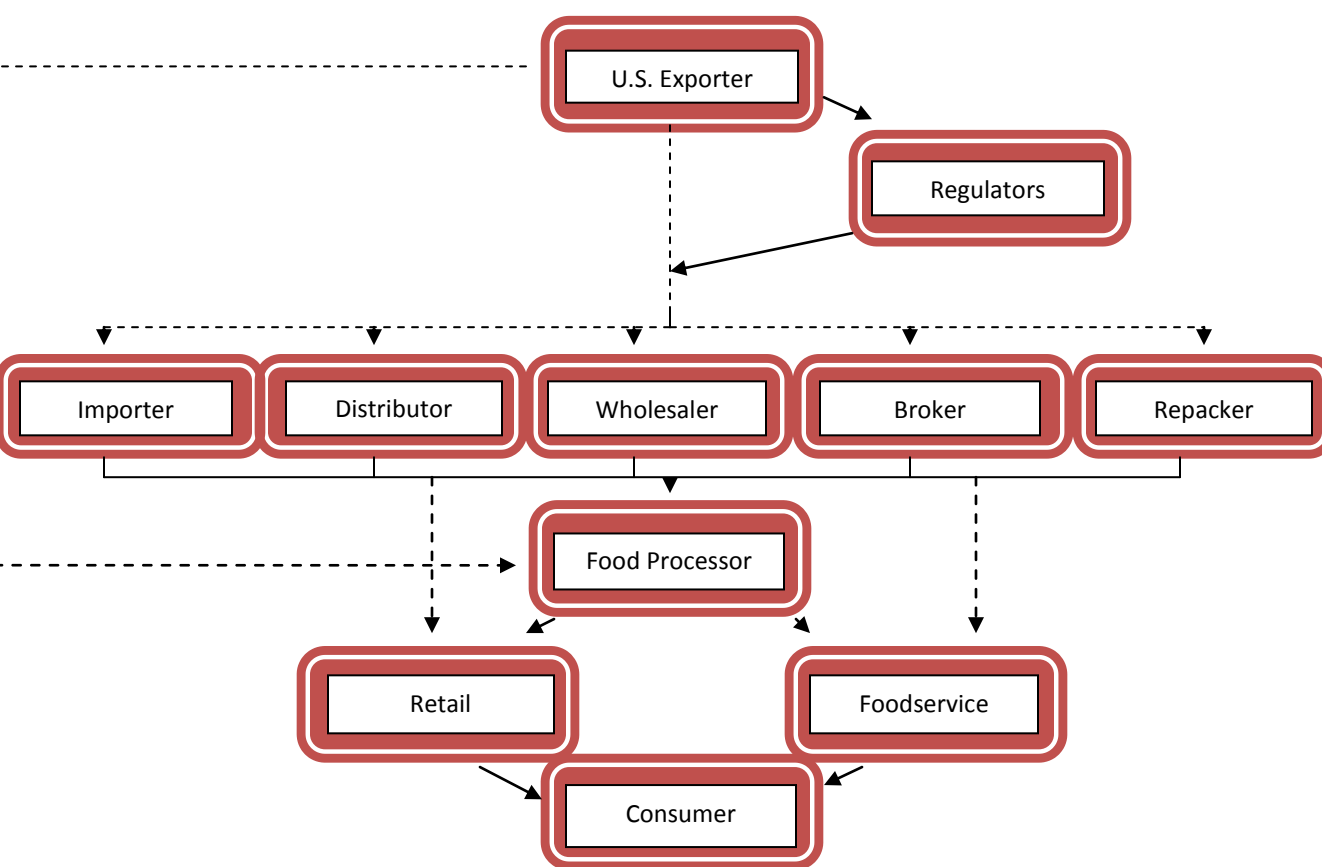
7:00 a.m. to 03:00 a.m. (Eastern Time)
Telephone and EDI: 1-800-835-4486 (Canada or U.S.A.)
1-905-795-7834 (local calls and all other countries)
Facsimile: 1-905-795-9658

5. SIAL CANADA

The USDA and FAS Canada endorse and organize a U.S. pavilion at SIAL Canada every year. The next SIAL Canada show is scheduled for April 30 to May 2, 2013 in Toronto, Ontario. For further information, please contact:

Office of Agricultural Affairs
Embassy of the United States of America
P.O. Box 866, Station B
Ottawa, Ontario
Phone: (613) 6885267
Fax: (613) 6883124
Email: agottawa@fas.usda.gov

MARKET STRUCTURE



Consolidation of the Canadian food industry has eliminated numerous intermediary procurement processes. Most food and beverage processing companies now prefer to import directly. Buying direct reduces handling, expedites shipments and generally reduces product costs, provided that volumes are large enough to benefit from a full truck load or consolidated shipments. Small volumes (less than a truckload) are usually procured locally from a Canadian wholesaler, importer, broker or agent. Procurement methods do vary from company to company and from product to product. However, regardless of the method of procurement, all products must be in alignment with government import regulation and meet minimum Canadian standards.

Consolidation of the Canadian retail and food service industry has meant that U.S. food and beverage processing companies face increasingly demanding buyers with significant market power. Aside from the continuous pressure on margins, processors are being asked to assist retail and food service companies to help define points of differentiation. New products that truly address specific consumer needs are the best means for processors to stave off the inevitable demand to produce private label product for retail and food service operators.

Processors should be aware that there is a heightened interest in food safety and information about ingredients including the origin of major ingredients and processing methods. Food service and retail operators are also seeking longer shelf life to deal with both the consumer trend toward fresh products and the geographic challenges of distribution in Canada. Opportunities are increasing in Canada for export ready processors able to meet the rapidly evolving consumer demands and having strong logistics capabilities.

COMPANY PROFILES

Top 10 Canadian Food and Beverage Processors

Company (Product Types)	Sales \$1,000/year	End-use channels	Production Location (#)	Procurement Channels
George Weston Ltd. (Fresh and frozen baked goods, also owns Loblaw)	\$32,008,000 (2010)	Retail	Canada (35) U.S. (33)	Distributor/Broker Importer Direct
McCain Foods Ltd. (potato, appetizer and snack)	\$6,098,143 (2010)	Retail HRI	Canada (10) U.S. (10) S. America (3) Europe (12) S. Africa (3) Asia-Pacific (7)	Direct
Saputo Inc. (dairy and bakery)	\$5,810,582 (2010)	Retail HRI	Dairy - Canada (26) U.S. (16) Argentina (2) Europe (2) Grocery - Canada (1)	Direct
Maple Leaf Foods Inc.	\$4,968,119	Retail	Canada	Direct

Company (Product Types)	Sales \$1,000/year	End-use channels	Production Location (#)	Procurement Channels
(pork, poultry, bakery)	(2010)	HRI	U.S. U.K. Asia Mexico	
Molson Coors Brewing Co. (beer)	\$3,355,286 (2010)	Retail HRI	Canada (7) U.S. (9) U.K. (4) Asia (1)	Direct
Agropur Coopérative (dairy products)	\$3,345,177 (2010)	Retail HRI	Canada (18) U.S. (7) S. America (2)	Self
PepsiCo Foods Canada (oatmeal, snack foods)	\$3,173,430 (2010)	Retail HRI	Canada (8)	Direct
Parmalat Canada Inc. (dairy and fruit juices)	\$2,198,303 (2010)	Retail HRI	Canada (18)	Direct Importer
Cott Corp. (beverages)	\$1,857,399 (2010)	Retail HRI	Canada (6) U.S. (9) Mexico (2) U.K. (3)	Direct
Pepsi Beverages Co.	\$1,150,726 (2010)	Retail HRI	Canada (6)	Direct

Top Five Foreign Controlled Food and Beverage Manufacturing Firms in Canada

Company (Product Types)	Sales (\$Thou)/year	End-use channels	Production Location	Procurement Channels
PepsiCo Foods Canada (oatmeal, snack foods)	\$3,173,430 (2010)	Retail HRI	Canada (8)	Direct
Parmalat Canada Inc. (dairy and fruit juices)	\$2,198,303 (2010)	Retail HRI	Canada (18)	Direct Importer
Pepsi Beverages Co.	\$1,150,726 (2010)	Retail HRI	Canada (6)	Direct
General Mills Corp. (cereals, bakery, snack foods, frozen and shelf stable fruits and	\$761,398 (2010)	Retail HRI	U.S. (28) Canada (2) Asia/Pacific	Direct

Company (Product Types)	Sales (\$Thou)/year	End-use channels	Production Location	Procurement Channels
vegetables)			(10) Europe (5) Latin America and Mexico (4) S. Africa (1)	
Smucker Foods of Canada (fruit spreads, retail packaged coffee, peanut butter, shortening and oils, ice cream toppings, sweetened condensed milk, and health and natural foods beverages)	\$413,652 (2010)	Retail HRI	U.S. (17) Canada (4)	Direct Importer

Industry Canada maintains a more complete company directory on their website. A directory of food manufacturing companies can be found at:

<http://strategis.ic.gc.ca/app/ccc/sld/cmpny.do?letter=A&lang=eng&profileId=1461&naics=311>.

A listing of beverage manufacturing companies can be found at:

<http://strategis.ic.gc.ca/app/ccc/sld/cmpny.do?letter=A&lang=eng&profileId=1461&naics=312>.

SECTOR TRENDS

Consumer trends have always created opportunities for food manufacturers. However, more recently consumer trends have affected choice and source of ingredients used in food manufacturing. Some of the more important drivers of change influencing consumer trends and manufacturing opportunities include:

- Aging population, obesity and the health care crisis leading to the wellness trend
- Increasing reliance on imported foods and growing worries of food contamination raising the organic, natural and local food trend
- Global warming and other serious environmental challenges driving the ethical eating trends
- Traceability
- Ethnic shoppers
- Food allergies

GENERAL HEALTH AND WELLNESS

As consumers get older, their desire to lead healthy and active lives is of increasing importance to them. In response to initiatives by governments, health organizations and consumers, 88 percent of manufacturers report that they are planning to release new products with specific nutritional benefits in the next two to three years. Already, 61 percent of manufacturers have reformulated products to make

them healthier. Companies will continue to work to lower the amount of sodium, sugar and high-fructose corn syrup in their products.

One of the fastest growing areas under wellness is functional foods. The market in Canada is currently valued at C\$4 billion. Functional foods are conventional foods that have had healthy ingredients added to them that go beyond regular nutritional functions. Examples of functional foods include probiotic yogurts (added bacteria cultures to promote health in the gastrointestinal tract); omega-3 fortified eggs, and beverages with added vitamins and minerals. The market for functional foods is large and growing as more and more people are beginning to see the benefits of making small changes to their diets. The market is expected to continue to grow rapidly as consumers gain a better understanding of the relationship between diet and health and as the aging population increasingly turns to preventative health initiatives. For more information on functional foods and nutraceuticals in Canada, visit <http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1170856376710&lang=eng>.

ORGANIC AND NATURAL

The Canadian introduction of retail chain giant Whole Foods has solidified an industry commitment to healthy eating alternatives. As of January 2013, Whole Foods Canada has eight stores (4 in the Greater Toronto Area and 4 in Vancouver) with plans to open 2-3 more stores per year for the next five years. There is increasing interest for food grown under a production system that prohibits the use of synthetic chemicals and also promotes soil health, biodiversity, low stress treatment of animals and sound environmental practices. Although the natural and organic market represents a fraction of overall food spending, the market is growing at a rate of 20 percent annually and will represent, some experts say, the largest potential for growth in retail in the coming years.

The number of organic items carried in mainstream supermarkets is rising steadily and many of the largest companies including major U.S. food processors have now launched organic products under some of Canada's best known brands. An example of this is the new organic line of products from Kraft Foods.

Products that claim attributes such as "no antibiotics", "no hormones", and "100% vegetarian feed" do not command the same price premiums as those labeled as certified organic. However, these products are growing because they serve the store interest of differentiation and still carry a 10% to 20% premium compared to regular products while being generally more affordable than organics.

ETHICAL/ENVIRONMENTAL EATING

Experts are suggesting that the trend is destined to have the most impact on the food processing industry is the growing interest in sustainability. This trend overlaps with the wellness and organic foods, however ethical eating goes beyond taste and health concerns and into the realm of green politics and anti-globalization. It includes concepts of "fair trade" and "sustainable" and also "food miles" which bring together the related concepts of locality and seasonality. Good farming practices in terms of the treatment of livestock are also part of this trend.

Multinational food processors are actively involved in the sustainability movement with many seeking sustainability certifications from third party organizations such as Ocean Wise, administered by the Vancouver Aquarium, or the Marine Stewardship Council for seafood products. For other products, organizations like the World Wildlife Federation (WWF) and the Forest Stewardship Council (FSC) can provide certification that products were produced in a sustainable fashion. Large companies such as Loblaw, McDonald's and Wal-Mart are beginning to make sustainability an important part of their business plans throughout their entire supply chains.

TRACEABILITY

As seen in the growing "Buy Local" movement in Canada, consumers increasingly care about where their food comes from. Reasons for this include concern for the local economy and environmental concerns regarding how far food must travel before it reaches the consumers. The concern is also being driven by high profile food safety breaches some of which are related to imported foods as well as issues raised under the wellness and ethical eating headings. However, it is also a food trend in its own right as traditionally certain foods from certain areas were considered to be the gold standard in taste or health. This trend can be an opportunity for U.S. producers since Canadian consumers view products from the United States as safer and of better quality than imports from other countries. Consumers in the internet age no longer accept anything less than transparency. As is the case for the ethical food and organic trend, the ability to prosper from this trend will be closely tied to the ability to track, trace and verify product.

This represents more changes for food processors as it requires an ability to know one's supply chain to a far greater degree than is the case today. Significant improvements have been made in technologies to assist with trace back and product verification. For example, Sobey's (major Canadian supermarket chain) has launched an initiative that allows consumers to enter a code found on the packaging of their seafood on the Sobey's website to find out exactly when, where and how their fish was caught, right down to the name of the fisherman who landed the fish.

ETHNIC SHOPPERS

Ethnic food markets in Canada are worth an estimated C\$65 billion today and are growing by an approximate 15 to 20 percent annually. They are projected to reach C\$128 billion by 2020. By 2031, 72 percent of the population growth in Canada will be driven by people who are visible minorities. Consumers of South Asian and Chinese backgrounds make up the largest ethnic groups and are projected to continue growing. Immigration from Europe accounts for a smaller percentage than it traditionally has. Within immigrants from the Americas, origin is shifting from the United States and Caribbean to Mexico and South America.

FOOD ALLERGIES

Approximately one in every 13 Canadians is affected by a food allergy and products that cater to those with allergies have been enjoying strong growth. From March 2009 to March 2010, gluten-free products alone grew 12.2 percent to reach US\$3.63 billion.

In Canada, the priority allergens are: peanuts, tree nuts, sesame seeds, wheat and triticale, milk, eggs, fish, crustaceans, shellfish, soybeans, mustard seeds, grains containing gluten, and added sulphites. Beginning August 4, 2012 these allergens must be listed on a product label, more information on food allergens and labeling can be found at:

<http://www.inspection.gc.ca/english/fssa/labeti/allerg/allerginduse.shtml>

SECTION 3: COMPETITION

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
FRESH FRUITS & VEGETABLES VEGETABLES: CANADIAN GLOBAL IMPORTS: U.S.\$2.2 BILLION	VEGETABLES: 1. U.S.: 66% 2. Mexico: 25% 3. China: 2%	<ul style="list-style-type: none"> Canada is the largest foreign buyer of U.S. fruits and vegetables. The U.S. benefits from relatively unimpeded export access into Canada during Canada's winter or non-growing months. Among imports, U.S. fruits and vegetables are viewed by most Canadians as their number one choice to other imports. Mexico gained significant share of the market due to lower prices. Their leading products are tomatoes, peppers, avocados, mangos, and limes. Recently, Mexico has begun offering strawberries. Chile is competitive with their leading exports of grapes and berries. They offer apples and cherries as well. 	<ul style="list-style-type: none"> Dry onions, carrots, lettuce, sweet corn, cabbage are the leading vegetables sold in the fresh market. Apples are the largest production item, followed by blueberries, cranberries, grapes and peaches. Seasonality poses a constraint to growers; Canada imports 80% of its fresh vegetables between November and June. The 'Buy Local' campaigns are well supported by grocery retailers starting in June through October with year round support becoming more common as well.
FRUIT: CANADIAN GLOBAL IMPORTS:	FRUIT: 1. U.S.: 48% 2. Mexico: 11%		

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
U.S. \$3.1 BILLION	3. Chile: 10% 4. Costa Rica: 6%		
PROCESSED FRUITS AND VEGETABLES CANADIAN GLOBAL IMPORTS: U.S. \$ 1.9 BILLION	1. U.S.: 59% 2. China: 9% 3. Thailand: 4%	<ul style="list-style-type: none"> ▪ The U.S imports amounted to U.S\$ 1.2 billion. There is a full range of prepared and frozen products. Major products are prepared potatoes, tomato paste, mixed fruits, and a variety of processed vegetables. ▪ The U.S. is a major player in the market with established process brands. ▪ China has seen a 15% growth in the category of dried fruits and vegetables. ▪ Thailand's major products are pineapples and fruit mixtures. 	<ul style="list-style-type: none"> ▪ Canadian companies process a wide range of canned, chilled, and frozen products. ▪ Adoption of advanced technologies in food processing has been fairly extensive among Canadian processors. Statistics Canada reported almost 50% companies reported adopting more than 5 new technologies in their operations. ▪ Higher manufacturing and operation costs than in the U.S.
SNACK FOODS CANADIAN GLOBAL IMPORTS: U.S. \$ 1.5 BILLION (excluding nuts)	1. U.S.: 58% 2. Germany: 5% 3. Belgium: 5 % (U.S. share of sub category 82%)	<ul style="list-style-type: none"> ▪ The U.S. dominates this category given the more perishable and bulky nature of some products, such as chips, which adds significantly to shipping costs. ▪ Competitors vary by sub category, with the main competitors being: Germany (cocoa, confectionaries and chocolate), Belgium (chocolate and confections), U.K. and Switzerland (chocolate, along with confection and non-confection items). 	<ul style="list-style-type: none"> ▪ Canada's snack food imports have grown by U.S. \$ 316 million since 2006. The category includes chocolate and non-chocolate confectionary, cookies, crackers, potato chips, corn chips, popped popcorn, pretzels, and extruded cheese snacks, seed snacks, mixed nuts, peanuts and peanut butter, as well as pork rinds. ▪ The snack food industry is served primarily by domestic manufacturers, however domestic market share is being lost to imports. The rapid increase in imports is due both to the strengthening Canadian dollar and a number of new products in the category, many targeted at specific ethnic groups

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
			<ul style="list-style-type: none"> Canada does have domestic raw materials for the grain based products but has to import sugar, chocolate, cacao, and nuts for manufacturing and is not competitive on dairy and egg ingredients used in some of the processing.
RED MEATS (Fresh/Chilled/Frozen) CANADIAN GLOBAL IMPORTS: U.S. \$1.7 BILLION RED MEATS (Prepared/Preserved)	1. U.S.: 79% 2. New Zealand: 12% 3. Australia: 6% 1. U.S.: 94% 2. Thailand: 2% 3. Brazil: 2%	<ul style="list-style-type: none"> Beef imports fall into two distinct categories. The largest portion of imports being chilled cuts traditionally from the U.S. Midwest heavily destined for the Ontario region. The other part is frozen manufacturing meat from Australia (for grinding) and New Zealand (largely for specific manufacturing purposes). Uruguay, which is beginning to make inroads in the manufacturing market, remains ineligible for entry to Canada (except as a supplier of cooked and canned beef) due to sanitary reasons. 	<ul style="list-style-type: none"> Canada continues to grow as a key U.S. pork export market. Canadian hog production numbers have been declining across the country and U.S. pork imports are up 6.5% due to market structures and the Canadian strong dollar. The industry has worked its way out of the inventory surge from the BSE trade disruption. Canadian exports have been sluggish due to a strong Canadian dollar but increased by 1% in 2011. Canadian per capita basis consumption has declined since 2006 from 31 kilograms to 29 kilograms.
FISH & SEAFOOD CANADIAN GLOBAL IMPORTS: U.S. \$ 2.4 BILLION	1. U.S.: 36% 2. China: 16% 3. Thailand: 16%	<ul style="list-style-type: none"> Two major categories make up approximately half of the imports: Crustaceans (including lobster, crab, shrimp and prawn) totaling U.S. \$ 915 million with the U.S. representing 34% market of the share; Thailand's share is 26% and China's is 11%. The other category is fresh and frozen fish fillets. Canada world imports are U.S. \$ 1 billion with the U.S. share at 24% followed by China at 24%, Thailand at 14%, and Chile at 10%. Fish filleting is extremely labor intensive, which accounts for 	<ul style="list-style-type: none"> Declining fish stocks have led to almost zero growth in fish and seafood catch over the last decade. In total, the capture fishery accounts for 76 percent of total fish and seafood production in Canada. Lobster, crab and shrimp comprise 67% of the landed value of all fish and shellfish harvested in Canada. Aquaculture is increasing in importance. Key products include farmed salmon, trout, steelhead, arctic char, blue mussels, oysters and manila clams. At approximately 50 lbs. per person, Canadian consumption

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
		<p>the rapid penetration of China and Thailand in this segment.</p> <ul style="list-style-type: none"> With ocean catches having peaked, aqua culture is becoming a more important source of product and China is the dominant producer of farmed fish and seafood in the world. A growing concern among consumers and retailers for sustainable production practices may help some U.S. fish processors. More than two-thirds of seafood is sold by retailers. 	<p>of fish is significantly higher than in the U.S. 16.5 lbs. per person, making Canada an excellent export market for U.S. exporters.</p>
BREAKFAST CEREALS/PANCAKE MIXES CANADIAN GLOBAL IMPORTS: U.S. \$ 424 MILLION	1. U.S.: 93% 2. U.K.: 2% 3. Mexico: 1%	<ul style="list-style-type: none"> Breakfast cereal imports have grown by over US \$150 million since 2006. The U.S. continues to dominate imports although a variety of competitors are all growing small niche positions. Canada represents the largest market for U.S. Breakfast cereals accounting for approximately half of U.S. exports. 	<ul style="list-style-type: none"> Sales and manufacturing in Canada is largely controlled by U.S. based companies. Domestic non-U.S. owned competitors tend to be in the specialty or organic breakfast cereal business. Canadian consumption of breakfast cereals reached an annual 9 lbs per person. Three key trends in cereal consumption have driven continues growth, reduced sugar, high fiber whole wheat, and hot cereals.
FRUIT & VEGETABLE JUICES CANADIAN GLOBAL IMPORTS: U.S. \$739 MILLION	1. U.S.: 60% 2. Brazil 15% 3. China 7%	<ul style="list-style-type: none"> U.S. imports to Canada increased and fastest growing juice category, fresh orange juice. Brazil is the leader in frozen orange juice concentrate, the second largest imported juice category, with 70% of the import share. China's major juice export to Canada is fortified apple juice; China represents 89% of this 	<ul style="list-style-type: none"> Canada is a major per capita consumer of citrus juices but is unable to grow these products. It will continue to be an exceptional value added market for the U.S. Both Canada and the U.S. have experienced major penetration by Chinese apple juice due to the major shift of Chinese agriculture toward labor-intensive crops and labor intensive processing.

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
		import market.	
NUTS CANADIAN GLOBAL IMPORTS: U.S. \$609 MILLION	1. U.S.: 54% 2. Turkey: 15% 3. Vietnam 9%	<ul style="list-style-type: none"> In 2010 and 2011 U.S. imports of almonds, peanuts and walnuts increased between 26% to 28% from the previous year. US products, led by peanuts and almonds, are preferred by Canadian importers as it meets Canadian sanitary and phytosanitary standards consistently. Turkey is a competitive supplier of Hazelnuts. Vietnam competes with cashew nuts. Growing trend of nut allergens by Canadians has caused the Canadian Food Inspection Agency and Health Canada to set specific allergen labeling regulations for all suppliers. Many schools and public spaces (including Air Canada) are banning nuts to maintain a safe environment for those with allergies. 	<ul style="list-style-type: none"> Canadian per capita consumption of peanuts and tree nuts increased respectively from 2.4 to 2.7 kg and 1.2 to 1.3 kg from 2005 to 2006. Canada has areas of Ontario, which can grow peanuts, but it has not done so in commercial quantities as the returns are not competitive with other crop alternatives. Similarly British Columbia and other provinces produce small quantities of a number of tree nuts including hazelnuts. However, in general, Canada is not price competitive.
PET FOOD (Dog and Cat) CANADIAN GLOBAL IMPORTS: U.S. \$ 536 MILLION	1. U.S.: 94% 2. China: 2% 3. Thailand: 2%	<ul style="list-style-type: none"> Canadian imports of U.S. dog and cat food registered at U.S. \$ 505 million in 2011. Canadians regard U.S. pet foods as a trusted and quality product. 	<ul style="list-style-type: none"> Pet food sector is largely U.S. owned multinationals. Canada has approximately 17 (non-raw) pet food manufacturers. New pet food importation requirements have been in place as of June 2009. More than 322,000 tons of pet food is sold in Canada.

SECTION 4: BEST PRODUCT PROSPECTS

HIGH PHYSICAL GROWTH

	Growing
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Category	+4% to 10%	Over 10%
Beverages	Bottled water - still, 2L and less (7%)	Sparkling water (15%) Chilled drinks and nectars (24%) Family service Smoothies (39.5%) Coffee (29%)
Dry Grocery	Sugar (10%) Flour (10%) Baking Chips (8%) Cake Mixes (7%) Icing Products (8%) Candy Confections (6%) Hot Sauce (9%)	Snack Crackers (15.3%)
Frozen Foods	Thin Crust Pizza (7%)	Thick Crust Pizza (15%) 1-2 Serving Size Pizza (26%)
Perishables	Bread – commercial (4%) Dips (6% - Hummus=19%) Pre-packaged Salad (5%)	Eggs (9%)
Prepared Foods	Indian Food (8%) Snack Foods (4%) Chocolate (4%)	
Refrigerated & Dairy	Natural Cheese (6%) Yogurt (5%)	Luncheon Meat (13%)

Source: Canadian Grocer Category Captains 2012 Report

PRODUCTS FACING SIGNIFICANT BARRIERS

For a more in-depth review of Canada's food laws and regulations and how they may affect U.S. food exporters, please see FAS Canada's Food and Agricultural Import regulations (FAIRS) Report. Due to the complexity of legislative requirements, it is recommended to contact a Canadian Food Inspection Agency (CFIA) Import Service Centre to obtain complete and current information regarding your specific product. The CFIA is responsible for the inspection of food products at all levels of trade. Following are some of the key restrictions that could inhibit certain products from entering the country.

Tariff Rate Quota (TRQ)

Under the General Agreement on Tariffs and Trade (GATT), Canada is permitted to control and limit certain imports under its supply management system. With the signing of the World Trade Organization's (WTO) Agreement on Agriculture in December 1993, Canada converted its existing agricultural quantitative import controls to a system of tariff rate quotas (TRQs) that came into effect in 1995.

Under the TRQ system, applicable products up to a certain volume are imported at the "within access commitment" tariff rate. Over this permitted level, the "over-access commitment" tariff rate escalates.

These higher tariffs enable Canada to maintain its system of supply management for certain agricultural products.

The method for establishing the allocation of import access quantities is prescribed in the Exports and Import Permits Act and is administered by the Export and Import Controls Bureau (EICB) of the Department of Foreign Affairs and International Trade (DFAIT). Documentation on the allocation system and principle of TRQ allocation, together with data on permits issued can be found at: www.dfait-maeci.gc.ca/eicb.

Issuance and control of import quota is administered by the EICB in collaboration with the Canada Border services Agency.

U.S. products that fall into this category include:

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- | | |
|------------------------------------|----------------|
| • Broiler hatching chicks and eggs | • Chicken |
| • Turkey | • Butter |
| • Cheese | • Buttermilk |
| • Milk and Cream | • Dairy Blends |
| • Yogurt | • Margarine |
| • Eggs | |
-

OTHER INFORMATION AFFECTING IMPORTS OF FOOD INGREDIENTS

The Canadian Government has multiple acts that govern the importation and sales of foods. Some of the most important ones are:

- [Canada Agricultural Product Act and Associated Regulations](#)
- [Consumer Packaging and Labelling Act](#)
- [Fish Inspection Act](#)
- [Food and Drug Act](#)
- [Food and Drug Regulations](#)
- [Importation of Intoxicating Liquors Act](#)
- [Meat Inspection Act](#)
- [Weight and Measures Act](#)

Health Canada

Health Canada continues to develop standards and policies for the safety of the food supply, which are applied by the CFIA.

All foods sold in Canada are subject to the Food and Drugs Act and Regulations which contains health and safety requirements, labeling requirements and provision preventing deception and fraud. However, many agricultural and fish products are also subject to other legislations. Consequently, the need for licensing, permits and certificates depends upon the type of food being imported and in some cases on the country or area from which the food is imported. It should be noted that in some provinces, there are additional requirements for certain foods, such as dairy products, bottled water and maple syrup.

The Food and Drug Regulations (FDR) outline the specifications and further requirements for standardized and non-standardized products. The following are just a few examples of regulatory issues, which could pose a barrier for some United States food companies attempting to sell in Canada.

Food Additives: In the absence of specifications under the FDR, food additives must conform to specification in the Food Chemical Codex (as required by section B.01.045 of the FDR). There are differences between Canadian and United States rules. A list of food additives permitted for use in Canada can be found at: http://www.hc-sc.gc.ca/fn-an/securit/addit/diction/dict_food-alim_add-eng.php.

Food Color: Synthetic food colors are the only additives that must be certified by the Health Products and Food Branch of Health Canada before being used in foods. Regulations concerning food colors are listed in Division 6 and Table III of Division 16 of the FDR.

Diet-Related Health Claims: The Canadian Food Inspection Agency enforces specific regulations regarding health claims that can be made about a product or ingredient. These regulations are in place to ensure accuracy and validity. For exact wording, visit <http://www.inspection.gc.ca/english/fssa/labeti/guide/ch8e.shtml#8.4>.

Agricultural Pesticide and other contaminants: Some agricultural pesticides approved for use in the United States are not registered for use in Canada. Foods which are found to contain unregistered residues over 0.1 parts per million are deemed to be adulterated. Specific acceptable Maximum Residue Limits (MRLs) exist for registered pesticides. For further information see: <http://www.hc-sc.gc.ca/cps-spc/pest/part/protect-protoger/food-nourriture/mrl-lmr-eng.php>.

Vitamin and Mineral Fortification: Fortification in Canada is under review. Health Canada has signaled it is looking at expanding discretionary fortification but with restrictions on which vitamins and minerals and what amounts. However, differences remain such as the folic acid exclusion on milled grain and bakery products.

For more information on fortification see: www.hc-sc.gc.ca/fn-an/nutrition/vitamin/index_e.html.

Trans Fats: In July 2007, Health Canada announced that it is adopting the Trans Fat Task Force's recommendation on trans fats, but will ask industry to voluntarily limit the trans fat content of vegetable oils and soft, spreadable margarines to 2 percent of the total fat content and to limit the trans fat content for all other foods to 5 percent, including ingredients sold to restaurants. Canada also requires that the levels of trans fat in pre-packaged food be included on the mandatory nutrition label. For more information on trans fat regulations, visit <http://www.hc-sc.gc.ca/fn-an/nutrition/gras-trans-fats/index-eng.php>.

Organic Standards: As of June 30, 2009, the Organic Products Regulations require mandatory certification to the revised National Organic Standard for agricultural products represented as organic in international and inter-provincial trade, or that bear the federal organic agricultural product legend (or federal logo). Due to the equivalency agreement with the United States, the USDA organic certification is fully recognized in Canada and there is no need for further certification in Canada for USDA-certified organic products. The CFIA has more information on regulations for organic products on their website at: <http://www.inspection.gc.ca/food/organic-products/eng/1300139461200/1300140373901>.

Novel Foods: Health Canada defines novel foods as products that have never been used as food, foods which result from a process that has not previously been used for food, or foods that have been modified by genetic manipulation. Novel foods regulations cover a variety of new food processes including the addition or deletion of genes (commonly referred to as genetically modified foods). For example, Health Canada has reviewed food produced by chemical mutagenesis of seed combined with traditional breeding, the use of new food processing techniques to extend shelf life and improve food quality and the use of natural coloring products introduced to food for purposes either than coloring. Canada's novel foods regulations require that the company, who wants to sell the products, prior to the marketing or advertising of a novel food, make notification to Health Products and Food Branch 9HPFB). For more information on the novel food regulations and approval procedure, see: www.hc-sc.gc.ca/fn-an/gmf-agm/index_e.html.

GOVERNMENT ORGANIZATIONS

Agriculture and Agri-Food Canada	Provides information and research on policies and programs. Also provides access to statistics. This Ministry is the counterpart to the USDA.	www.agr.gc.ca
Canada Border Services Agency	The Canada Border Services Agency (CBSA) ensures the security and prosperity of Canada by managing the access of people and goods to and from Canada.	www.cbsa.gc.ca
Canadian Food Inspection Agency (CFIA)	Government of Canada's regulator for food safety (along with Health Canada), animal health and plant protection.	www.inspection.gc.ca
Canada Revenue Agency	The Canada revenue Agency (CRA) administers tax laws for the Government of Canada and for most provinces and territories as well as various social and economic benefit and incentive programs delivered through the tax system.	www.cra-arc.gc.ca
Department of Foreign Affairs and International Trade (DFAIT)	The mandate of Foreign Affairs and International Trade is to manage Canada's diplomatic and consular relations and to encourage the country's international trade. DFAIT manages all tariff rate quotas and supplemental import permits for controlled products (primarily dairy and poultry).	www.international.gc.ca
Health Canada	Administers the Food Safety Assessment Program, which assesses the effectiveness of the CFIA's activities related to food safety.	www.hc-sc.gc.ca

Industry Canada	Information on specific sectors, as well as company profiles and other databases	www.ic.gc.ca
Department of Justice Canada – Justice Laws Website	Online consolidation of PDFs of Canadian Government Acts and regulations.	http://laws-lois.justice.gc.ca/eng/
Statistics Canada	The official source for Canadian social and economic statistics and products.	www.statcan.gc.ca

INDUSTRY ASSOCIATIONS

This is not an exhaustive list of all industry association in operation in Canada; however these are some of the most general. For additional associations, please consult <http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1171041784063&lang=eng>.

Canadian Federation of Independent Grocers	2235 Sheppard Ave. E., Suite 902 Willowdale, ON M2J 5B5 Tel: 1-800-661-2344 / 416-492-2311 Fax: 416-492-2347 Email: info@cfig.ca www.cfig.ca
Canadian Produce Marketing Association (CPMA)	162 Cleopatra Drive Ottawa, Ontario, Canada K2G 5X2 Telephone: (+1) 613-226-4187 Fax: (+1) 613-226-2984 www.cpma.ca
Fruit and Vegetable Dispute Resolution Corporation (FVDRC)	Building 75, Central Experimental Farm 930 Carling Ave. Ottawa, Ontario K1A 0C6 CANADA Phone: 613 234-0982 Fax: 613 234-8036 General E-mail: info@fvdrc.com www.fvdrc.com
Food and Consumer Product Manufacturers of Canada	Phone: 416-510-8024 Fax: 416-510-8043

	Email: info@fcpc.ca
	100 Sheppard Ave E Toronto, ON M2N 6Z1
	www.fcPMC.com
I.E. Canada (Canadian Association of Importers and Exporters)	Phone: 416-595-5333 Email: info@iecanada.com
	P.O. Box 189 Don Mills, Ontario M3C 2S2
	www.iecanada.com

PUBLICATIONS

Baker's Journal	www.bakersjournal.com
Canadian Grocer	www.canadiangrocer.com
Canadian Restaurant & Foodservice News	www.crfa.ca
C-Store Canada	www.c-storecanada.com
Food in Canada	www.canadianmanufacturing.com/food
Foodservice and Hospitality	www.foodserviceworld.com/
Western Grocer	www.westerngrocer.com

POST CONTACT AND FURTHER INFORMATION

CONVERSION RATE

Per the most recent Bank of Canada noon rate, on December 27, 2012, 1.00 Canadian Dollar(s) = 1.01 U.S. dollar(s), at an exchange rate of 1.0051 (using nominal rate).

Foreign Agricultural Service (FAS) Ottawa:

From the U.S.:	From Canada:
Office of Agricultural Affairs American Embassy P.O. Box 5000 Ogdensburg, NY 13669 USA	Office of Agricultural Affairs P.O. Box 866, Station B Ottawa ON K1P 5T1 Canada

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Market Sector Reports:

Listed below are the food sector and marketing reports published by FAS Canada. For a complete listing of other Post reports and of FAS' worldwide agricultural reporting, visit the FAS GAIN web page at <http://gain.fas.usda.gov>.

This Week in Canadian Agriculture is a periodic newsletter containing summaries of developments in the Canadian market, including regulatory changes. To be added to the distribution list, please contact FAS Canada at agottawa@fas.usda.gov.

CA12050	FAIRS Export Certificate Report	12/21/2012
CA12049	Export Guide: A Practical Guide	12/21/2012
CA12048	This Week in Canadian Agriculture – Issue 22	12/19/2012
CA12046	The New Legislative Framework for Animal Traceability - Public	12/03/2012
CA12045	This Week in Canadian Agriculture – Issue 21	11/26/2012
CA12044	This Week in Canadian Agriculture – Issue 20	11/13/2012
CA12042	Grain and Feed Annual	10/30/2012
CA12041	Fresh Deciduous Fruit Annual	11/02/2012
CA12040	This Week in Canadian Agriculture – Issue 19	10/18/2012
CA12039	Dairy Annual	10/15/2012
CA12037	Potatoes Annual	10/01/2012
CA12036	Livestock Annual	09/11/2012
CA12035	This Week in Canadian Agriculture – Issue 18	08/17/2012
CA12034	Poultry and Products Annual	08/16/2012
CA12033	This Week in Canadian Agriculture Issue 17	08/14/2012
CA12032	This Week in Canadian Agriculture Issue 16	08/03/2012
CA12031	Grain and Feed July Quarterly	07/27/2012
CA12030	FAIRS Country Report	07/27/2012
CA12029	Biotechnology Annual	07/20/2012
CA12028	This Week in Canadian Agriculture, Issue 15	07/20/2012
CA12027	Biofuels Annual 2012 – revised	07/20/2012
CA12025	This Week in Canadian Agriculture, Issue 14	07/06/2012
CA12024	Biofuels Annual 2012	06/29/2012
CA12022	This Week in Canadian Agriculture, Issue 13	06/15/2012
CA12021	This Week in Canadian Agriculture, Issue 12	06/01/2012
CA12020	This Week in Canadian Agriculture, Issue 11	05/17/2012
CA12019	This Week in Canadian Agriculture, Issue 10	05/10/2012
CA12018	This Week in Canadian Agriculture, Issue 09	05/04/2012
CA12017	This Week in Canadian Agriculture, Issue 08	04/27/2012
CA12016	This Week in Canadian Agriculture, Issue 07	04/25/2012
CA12015	Oilseeds and Products Annual - Canada	04/10/2012
CA12014	Grain and Feed Annual Report - Canada	04/03/2012
CA12011	Retail Food Sector Report for Canada	03/08/12

CA12010	This Week in Canadian Agriculture, Issue 06	03/02/2012
CA12009	Livestock Semi-annual	03/02/2012
CA12008	This Week in Canadian Agriculture, Issue 05	03/02/2012
CA12006	Northern Trends – Winter 2012	02/03/2012
CA12005	Grain And Feed Quarterly	01/27/2012
CA12004	This Week in Canadian Agriculture, Issue 04	01/25/2012
CA12003	This Week in Canadian Agriculture, Issue 03	01/19/2012
CA12002	This Week in Canadian Agriculture, Issue 02	01/11/2012
CA12001	This Week in Canadian Agriculture, Issue 01	01/06/2012